SonicWALL / Aventail WorkPlace 10.5.5 User Guide

SonicWALL E-CLASS

SONICWALL®

DYNAMIC SECURITY FOR THE GLOBAL NETWORK™

Aventail™

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Getting Started

The WorkPlace portal enables you to securely access private network resources—including Web sites, Web and client/server applications, terminal servers, and shared folders or files—from a Web browser. This section provides an overview of working with WorkPlace.

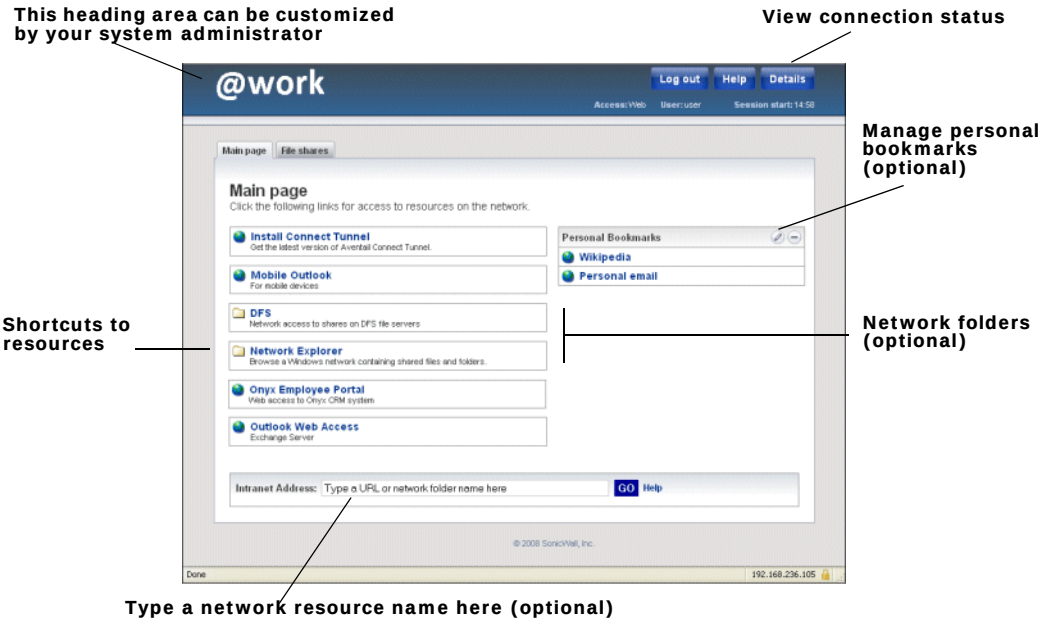
WorkPlace Overview

Your system administrator set up the resources that you see in WorkPlace, and can also customize the appearance of its pages. Some elements, such as the Network Explorer page, personal bookmarks, or the **Intranet Address** box, may not always be available.

To navigate to and from different pages in WorkPlace, use the navigation tools in WorkPlace (tabs or links) instead of your Web browser's **Back** and **Forward** buttons. Clicking the browser's navigation buttons may prompt you to terminate your WorkPlace session.

The Home Page

When you start WorkPlace, the home page displays any shortcuts that your administrator has configured for you. You can click these links for direct access to Web content, applications, or shared folders and files.



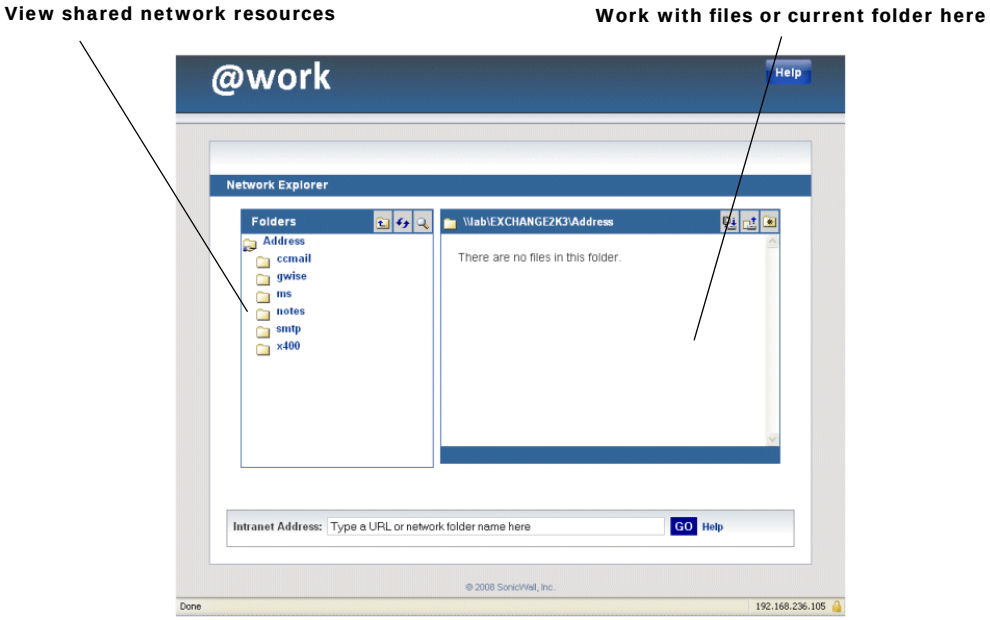
The WorkPlace home page includes connection status information indicating which access methods are currently enabled and the session start time. You can click the **Details** link in this area to view your security zone status (if applicable) and see information that can be helpful in troubleshooting

problems. For more information about access methods, see “Access Methods and Resources” on page 2. For more information about security zones, see “Viewing Security Zone Information” on page 26.

Depending on how your administrator has configured WorkPlace, the home page may include a **Personal Bookmarks** area that enables you to save and access your own collection of links to URLs and other resources, such as file shares. To manage your bookmarks, click the pencil icon. For more information, see “Using Bookmarks” on page 6.

The Network Explorer Page

Your system administrator can make the Network Explorer page available to you, giving you access to all the Windows network folders or files for which you have permissions. The navigation pane at the left displays a list of resources available on your network; the pane on the right enables you to work with folders and files.



Access Methods and Resources

WorkPlace enables you to access different types of resources. The specific resources available depend on the access methods currently enabled, as shown in the connection status area in WorkPlace. The following table describes the various access methods and the types of resources each one enables you to access.

Access method	Resources available
Web	• Web content and Web-based applications that can be accessed through a browser. Examples include general Web sites (such as intranets), Outlook Web Access, and Domino Web Access.
Web and client/server	• Web content and Web-based applications that can be accessed through a browser. • Client/server applications, thin client applications, and terminal servers. Examples include Outlook, Citrix, and Windows Terminal Services.

Access method	Resources available
Full network access	• Web content and Web-based applications that can be accessed through a browser. • Client/server applications, thin client applications, and terminal services. • Native Windows file access through Network Neighborhood. • Mapped network drives.

For more system status information, click **Details**. You'll see what SonicWALL Aventail agents are available on your device and what security zone (community) you have been assigned to. Your system administrator may also make WorkPlace shortcuts available that allow you to download and install additional clients (for example, Connect Tunnel and Connect Mobile).

Logging In to WorkPlace

Before you can access your WorkPlace resources, your identity must be verified. Depending on how your administrator has configured WorkPlace, this might mean selecting a specific login group (for example, "Employees" or "Partners"), and then providing credentials. You may be prompted for a username and password, which you can type in or enter by means of a virtual keyboard, or you may be prompted for some other form of credentials.

▶ To log in to WorkPlace

1. If you are presented with a **Log in to** prompt, select the appropriate group from the list. (This information is provided by your system administrator.) If the list does not contain the appropriate name, select *Other* from the list, and then type the group name in the box below the **Log in to** box.
2. Click **Next**.
3. When prompted for credentials, enter them, and then click **Login**.

   Your administrator can offer an alternative method for providing your credentials using a virtual keyboard. Some administrators may even require it if, for example, there is concern that a user's login credentials might be stolen. To enter your credentials without typing them, click **Use virtual keyboard** and point to characters on the keyboard display.
4. Windows users are prompted to install Aventail Access Manager, which takes care of installing agents and clients through the browser. Once it is installed, you automatically receive client updates.

Notes

- The URL you use to log in to WorkPlace is provided by your system administrator.
- Depending on how your administrator has configured WorkPlace, all other open browser windows may automatically close at WorkPlace startup, leaving only the WorkPlace browser window open.
- In some cases, you may be prompted to accept an Aventail security warning before WorkPlace can start. For more information, see "Using Cache Cleaner" on page 24.

Changing Your Password

Your administrator has the option of allowing you to change your own password in WorkPlace. If a user-initiated password change is allowed, you'll see the **Change password** checkbox.

▶ To change your password in WorkPlace

1. Click the **Change password** checkbox.
2. Enter your current credentials, and then click **Log in**.
3. On the password notification page, re-enter your old password, and then enter and confirm your new one.

Entering Credentials Using the Virtual Keyboard

The administrator can offer you an alternative method of providing your credentials in WorkPlace using a virtual keyboard. Some administrators may even require it if, for example, there is concern that a user's login credentials might be stolen.

▶ **To enter your credentials using the virtual keyboard in WorkPlace**

1. Click the **Use virtual keyboard** checkbox: a keyboard is displayed in WorkPlace. (If your administrator requires that you use the virtual keyboard, it is already displayed.)
2. Click the letters for the username. To enter a capital letter, first click the Shift key on the virtual keyboard.
3. Use your mouse to move the cursor to the password box, and then click the letters for your password.

Logging Out of WorkPlace

When you have finished working with network resources using WorkPlace, you should log out to close your session.

▶ **To log out of WorkPlace**

Click the **Log out** button in the upper-right area of the WorkPlace page.

Notes

- Logging out of WorkPlace ends your WorkPlace session, but it does not log you out of any applications that are running on your computer. To increase security, it is good practice to close any browser windows in use by applications before you log out of WorkPlace, especially if you are working on a computer that is shared with other users.

Accessing Network Resources

You can use several methods to access a specific resource. Depending on how your administrator has configured WorkPlace, some access methods may not always be available.

- **Shortcuts:** The WorkPlace home page displays any shortcuts that your administrator has configured for you. You can click these links to directly access selected Web applications, network shares or folders, or terminal servers. For more information, see "Using Shortcuts" on page 5.
- You can use the **Intranet Address** box at the bottom of the page to access a Web resource, a network resource, or a terminal server. For more information, see "Using the Intranet Address Box" on page 5.
- **Personal Bookmarks:** You may be able to create your own bookmarks for quick access to resources such as URLs and file shares. For more information, see "Using Bookmarks" on page 6.
- **Access methods:** To find out what access agents are running, click **Details** in WorkPlace. Your administrator may also make client installation packages available for download. For more information, see "Access Methods and Resources" on page 2.
- **Browsing network resources:** You can use the WorkPlace Network Explorer page to browse a Windows network, including shared folders and files. For more information, see "Working with Folders and Files" on page 7.

Notes

- Accessing some items may require you to log in, if special permissions are required for that item. WorkPlace first attempts to access network share resources using your WorkPlace login credentials; if the resource requires different credentials, you are prompted to supply them.

Using Shortcuts

When you start WorkPlace you see the shortcuts that your administrator has configured for you. How they are organized—in groups, or on different pages—is up to your administrator. You can click these links to directly access Web content, applications, shared folders, or terminal servers.

Shortcuts to Windows Terminal Services or Citrix resources provide an Edit icon to allow you to change the screen resolution, if enabled by your administrator. Any changes you make will be used every time you click the shortcut for that resource. If you do not make any changes, the screen resolution set by your administrator is used.

▶ **To access a resource using a shortcut**

Click the shortcut name for the resource you want to access. Web resources and terminal server resources open in a new browser window. Shared folders or files open in a separate Network Explorer window.

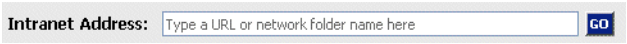
▶ **To configure the screen resolution for a resource**

Click the **Edit** icon for the resource shortcut to open the **Manage custom links** dialog box. Select one of the following from the **Screen resolution** drop-down list and then click **Save**:

- To use a resolution in the list, select the desired resolution.
- To create a custom resolution, select **Custom...** and then type the desired pixel values (width x height) into the fields that appear. The minimum supported resolution is 640x480 and the maximum is 4096x2048 pixels.
- To set the resource window size as a percentage of your client screen, select **Screen Percent** and then type the desired percentage into the **percent** field that appears.
- To use your full screen to display the resource, select **Full Screen**.

Using the Intranet Address Box

Depending on how your administrator has configured WorkPlace, you may see an **Intranet Address** box, which you can use to access network resources, terminal server resources, or, when WorkPlace is running in translated mode, Web resources.



Accessing Web Resources Using the Intranet Address Box

To access a Web resource, type the URL for the resource in the **Intranet Address** box, and then click **GO**. The Web resource opens in a new browser window.

Notes

- If you are accessing a standard HTTP resource, you do not need to type `http://` at the beginning of the URL. However, if you are accessing a secure Web (HTTPS) resource, you must include the `https://` protocol identifier in the URL (`https://intranet.example.com`).
- To access a Web resource on a non-standard port (other than port 80), include the port number after the resource's host name. For example, `intranet.example.com:443` and `intranet.example.com:8080/SAP` are both valid entries.

Accessing Network Resources Using the Intranet Address Box

To go directly to a server, computer, or network folder, type the item's path in the **Intranet Address** box, and then click **GO**. Network Explorer opens in a new browser window, displaying the contents of the requested folder or file.

When specifying a resource name, use the Windows Universal Naming Convention (UNC) name, in the format *\\ComputerName\ShareName\Path\FileName*. For example, to view the contents of the *\sales\proposals* folder on the *common* server, type the following in the **Intranet Address** box:

```
\\common\sales\proposals
```

Notes

- WorkPlace does not support unqualified host names for network resources; you must type the full UNC name when entering a network resource name in the **Intranet Address** box.
- Typing an unqualified host name in the **Intranet Address** box is interpreted as a Web resource, not a network resource. For example, if you have a Web resource named *intranet.example.com*, simply type `intranet` in the **Intranet Address** box to access it.

Accessing Terminal Servers Using the Intranet Address Box

To go directly to a terminal server resource, type its URL in the **Intranet Address** box, and then click **GO**. The resource opens in a new browser window.

When specifying a terminal server resource URL, you must include the appropriate protocol identifier. If a terminal server resource contains multiple hosts, you are prompted to type the host name or IP address of the specific resource you want to access.

Terminal server type	Identifier	Sample Intranet Address box entry
Windows Terminal Services	`rdp://`	`rdp://private.xyzcompany.com/wts_server`
Citrix	`citrix://`	`citrix://private.abccompany.com/citrix_farm`

Using Bookmarks

Depending on how your administrator has configured WorkPlace, the home page may include an area where you can save and access personal links to resources such as URLs and file shares.

WorkPlace bookmarks are similar to standard Web browser bookmarks or favorites lists, except that they are stored on the SonicWALL Aventail appliance, not on a specific computer. You can access and manage your WorkPlace personal links whenever you are logged in to WorkPlace, regardless of the computer you are using.

When you click a bookmark, the specified resource opens in a separate browser window.

Notes

- To access file shares through WorkPlace bookmarks, you must be running a SonicWALL Aventail access agent, such as one of the tunnel clients, or you must configure the bookmark to use a special URL. For more information, see “Adding Bookmarks” on page 7, or contact your system administrator.

Adding Bookmarks

After you add a bookmark, it appears in the **Personal Bookmarks** group in WorkPlace.

▶ **To add a bookmark**

1. In the **Personal Bookmarks** group in WorkPlace, click the pencil icon. The **Manage bookmarks** page appears.
2. Click **New**.
3. In the **Name** box, type a short, descriptive name for the bookmark. This name will appear as the link text in the **Personal Bookmarks** group in WorkPlace.
4. In the **Address** box, type the URL or path for the resource:
   - To create a bookmark for a URL, type the URL in *host/path* format. If you are creating a bookmark for a standard HTTP resource, you do not need to type `http://` in the URL. However, if you are creating a bookmark for a secure Web (HTTPS) resource, you must include the `https://` protocol identifier in the URL (`https://intranet.example.com`).
   - To create a bookmark for a file share resource, type the file share path in Windows Universal Naming Convention (UNC) format (`\\`*ComputerName*`\`*ShareName*`\`*Path*`\`*File*). For example, to add a bookmark for the *sales*`\`*proposals* folder on the *common* server, type `\\common\sales\proposals`.
5. Click **Save**.

Reordering Bookmarks

You can control the order of your bookmarks (for example, to place the most frequently used bookmarks at the top of the list).

▶ **To reorder a bookmark**

1. In the **Personal Bookmarks** group in WorkPlace, click the pencil icon. The **Manage bookmarks** page appears.
2. Select the check box to the left of any bookmarks you want to move, and then click **Move Up** or **Move Down**. Each click of the button moves the selected bookmarks one position in the list.
3. Click **Save**.

Deleting Bookmarks

You can delete bookmarks that you no longer need.

▶ **To delete a bookmark**

1. In the **Personal Bookmarks** group in WorkPlace, click the pencil icon. The **Manage bookmarks** page appears.
2. Select the check box to the left of any bookmarks you want to delete, and then click **Delete**.
3. Click **Save**.

Working with Folders and Files

WorkPlace enables you to work with network files and folders on a network using a Web browser much as if you were working locally on the network. The WorkPlace Network Explorer page displays shared folders or files that you have permission to access. You can browse these domains, servers, shares, folders, and files by clicking links on the Network Explorer page. The navigation pane at the left displays a list of resources available on your network. The pane on the right enables you to work with folders and files.

The Network Explorer page provides two modes of operation:

- **Folder mode:** When working in folder mode, you can browse available folders and their contents, upload a file to a folder, download multiple files as a compressed file, create a new folder, or rename or delete a folder. For more information, see “Working with Folders” on page 8.
- **File mode:** When working in file mode, you can rename, copy, move, delete, or view the properties of the selected file. For more information, see “Working with Files” on page 9.

Navigation tips

- When viewing the contents of a server or folder, the navigation pane shows the full path to the current folder as a hyperlink. Click any portion of the link to go directly to that folder.

- To move up one level to the parent folder, click the **Up** button in the navigation pane: If you do not have permissions to access the parent folder, this button does not appear.
- To update the contents of the navigation pane, click the **Refresh** button: This ensures that you are viewing the latest version of a network resource. For example, if you create a new file or folder and it does not show up in the navigation pane, click the **Refresh** button to update the display.

Notes

- Accessing some items may require you to log in, if special permissions are required for that item. WorkPlace first attempts to access network resources using your WorkPlace login credentials; if the resource requires different credentials, you are prompted to supply them.
- Depending on your network environment, you may be able to access folders on your networked desktop computer. To do this, you must make those folders available using the Windows Sharing feature on that computer. See your Windows documentation for more information about sharing folders.

Displaying the Network Explorer Page

You can display the Network Explorer page by doing one of the following (the methods available to you depend on how your administrator has configured WorkPlace):

- Click an appropriate network shortcut in WorkPlace.
- Type a UNC path name in the **Intranet Address** box.

Working with Folders

When working with folders, you must have the correct permissions to perform certain actions; these are the same permissions you would need if you were working directly on the network.

The folder page may include an option for uploading files from your computer to the current folder. If WorkPlace is not configured to allow uploading files, you will not see this option. For more information, see “Uploading Files” on page 11.

Viewing the Contents of a Folder

When you click a folder name, a page appears displaying that folder’s contents. You can perform a number of different actions within the current folder, such as sorting items and creating, renaming, and deleting folders.

▶ **To view the contents of a folder**

In the left navigation pane of the Network Explorer page, click the name of the folder you want to view. Any subfolders contained in the current folder are displayed in the left navigation pane. Any files contained in the current folder are displayed on the right.

Sorting Items in a Folder

You can sort the items in the current folder.

▶ **To sort items in the current folder**

In the right pane of the Network Explorer page, in the top row, click **Name**, **Size**, or **Date** to sort the folder's contents. The available sort methods are as follows:

Sort method	What it does
Name	Sorts items by file name, alphabetically.
Size	Sorts items by file size, smallest to largest.
Date	Sorts items by the last time they were changed, oldest to newest.

Creating Folders

You can create a folder within the current folder.

▶ **To create a folder**

1. In the left navigation pane of the Network Explorer page, click the name of the folder in which you want to create a new folder.
2. Click the **New folder** button:
3. In the **New folder name** box, type the name of the folder you want to create, and then click **Create**.

Renaming Folders

You can rename the current folder.

▶ **To rename a folder**

1. In the left navigation pane of the Network Explorer page, click the name of the folder to rename.
2. Click the **Rename folder** button:
3. In the **New folder name** box, type a new name for the folder, and then click **Rename**.

Deleting Folders

You can delete the current folder if it is empty (to delete a folder that is not empty, first delete the files in it; see "Deleting Files" on page 12). You are prompted to confirm before deleting the folder.

▶ **To delete a folder**

1. In the left navigation pane of the Network Explorer page, click the name of the folder to delete.
2. Click the **Delete folder** button:
3. Click **Delete**.

Working with Files

When working with files, you must have the correct permissions to perform certain actions; these are the same permissions you would need if you were working directly on the network.

Opening Files

You can open a file to display its contents; however, any changes that you make to the file will not be saved to the network. To modify the contents of a file, you must download a copy of the file to your computer, save your changes to the copied file, and then upload the new version of the file to the network.

▶ **To open a file**

1. In the left navigation pane of the Network Explorer page, click the name of the folder that contains the file you want to open.
2. In the right pane of the Network Explorer page, click the **Open** link to the left of the file you want to open.

Alternatively, on the **File Details** page, you can click the **Open file** button to open the file:

Notes

- When you open a file, Web content opens in a new browser window, while other files open in their native applications.
- If the application required to open a file cannot be found, you are prompted to save or open the file.
- Certain types of files, such as executable files or data files with proprietary file formats, must be downloaded or saved (they cannot be opened directly).

Searching for Files

You can search for files in the current folder and any subfolders. The search results are displayed as a list of links; you can click a link to display a file.

WorkPlace supports the use of wildcards when searching for files, which is useful if you do not know the full or exact name of the file you are searching for. The supported wildcard characters are "?" and "*". The question mark (?) represents exactly one character, and the asterisk (*) represents any number of characters, including none (zero characters). For example:

Wildcard	What it matches
p*.txt	Any file that begins with *p* and has a *.txt* extension (for example, *prices.txt* or *p.txt*)
*.txt	Any file that has a *.txt* extension (for example, *prices.txt* or *sales_forecast.txt*)
pe?t.txt	Any file that begins with *pe* followed by any other single character, ends with *t*, and has a *.txt* extension (for example, *peat.txt* or *pest.txt*)

▶ **To search for files**

1. In the left navigation pane of the Network Explorer page, click the name of the folder that you want WorkPlace to search.
2. Click the **Search** button:
3. In the **Search for files** box, type the search criteria for the files.
4. Select the **Search subfolders** check box to recursively search all folders within the current folder. If this check box is not selected, only the current folder is searched.
5. Click **Search**.

Notes

- The search function is configured to time out after five minutes. If a search times out, narrow your search parameters and try again.
- The search function returns a maximum of 250 results per search. If a search returns too many results, narrow your search parameters and try again.

Viewing File Details

When you click a file name, a page appears displaying information such as the file size and creation date. It also lets you perform a number of actions on the current file, such as downloading, copying, renaming, or deleting it.

▶ **To view file details**

Click the appropriate file name in the right pane of the Network Explorer page:

Downloading Files

You can download the current file to your local computer.

▶ **To download a file**

1. In the right pane of the Network Explorer page, click the file name of the file you want to download. The **File Details** page appears.
2. Click the **Download file** button:
   In most Web browsers, a dialog box appears prompting you to save or open the file.

Downloading Multiple Files as a Compressed File

You can download multiple files from a folder to your local computer as a compressed file (in *.zip* format). This provides a convenient way to download a group of files in a single file, while minimizing download time over slower network connections.

Only the files in the current folder are downloaded; you cannot include subfolders in a download.

▶ **To download a folder as a compressed file**

1. In the left navigation pane of the Network Explorer page, click the name of the folder that contains the files you want to download.
2. In the right pane, select the check boxes next to any files that you want to include in the download. To select all files in a folder, select the check box at the top of the pane.
3. Click the **Download selected files** button:
4. Click **Download**. You are prompted to open the file or save it to your computer.

Notes

- Compressed files can be uncompressed using any program that can uncompress *.zip* files, such as WinZip, PKZIP, or StuffIt. Also, some versions of Windows can uncompress *.zip* files.
- Creating the compressed file and downloading it may take some time, depending on the size and number of files.

Uploading Files

The folder page may include an option for uploading files from your computer to the current folder. If WorkPlace is not configured to allow uploading files, you will not see this option.

▶ **To upload a file to a folder**

1. In the left navigation pane of the Network Explorer page, click the name of the folder to which you want to upload the file.
2. Click the **Upload file** button:
3. Next to the **Source file** box, click **Browse** to locate the file you want to upload from your computer.
4. Click **Upload**.

Copying Files

You can copy a file to another folder on your network. You can also rename the file at the same time you copy it. Before copying a file, make sure that the folder to which you want to copy the file already exists. The destination folder for the copied file can be anywhere on the network.

▶ **To copy the current file**

1. In the right pane of the Network Explorer page, click the name of the file you want to copy. The **File Details** page appears.
2. Click the **Copy file** button:
3. In the **Destination path** box, type the new location for the copied file. You must specify a path for the file using the UNC name. This takes the following form: *ComputerName**ShareName**Path*.
4. If you want to rename the file, type a new file name in the **Destination file** box.
5. Click **Copy**.

Renaming Files

You can rename the current file.

▶ **To rename a file**

1. In the right pane of the Network Explorer page, click the name of the file you want to rename. The **File Details** page appears.
2. Click the **Rename file** button:
In the **New file name** box, type the new file name, and then click **Rename**.

Moving Files

You can move a file to another location. You can also rename the file at the same time you move it. Before moving a file, make sure that the folder to which you want to move the file already exists.

▶ **To move the current file**

1. In the right pane of the Network Explorer page, click the name of the file you want to move. The **File Details** page appears.
2. Click the **Move file** button:
3. In the **Destination path** box, type the new location for the file. You must specify a path for the file using the UNC name. This takes the following form: *ComputerName**ShareName**Path*.
4. If you want to rename the file, type the new file name in the **Destination file** box.
5. Click **Move**.

Deleting Files

You can delete one or more files from a folder. You are prompted to confirm the deletion.

▶ **To delete a single file**

1. In the right pane of the Network Explorer page, click the name of the file you want to delete. The **File Details** page appears.
2. Click the **Delete file** button:
3. Click **Delete**.

▶ **To delete multiple files**

1. In the left navigation pane of the Network Explorer page, click the name of the folder that contains the files to delete.

2. In the right pane, select the check boxes to the left of any files that you want to delete. To delete all of the files in the folder, select the check box at the top of the list.
3. Click the **Delete selected files** button:
4. Click **Delete**.

Virtual Assist

This section describes the Virtual Assist feature from both the technician and client point-of-view.

What is Virtual Assist?

SonicWALL's Virtual Assist is a remote support tool that enables an administrator or help desk technician to assume control of a user's PC or laptop in order to provide remote technical assistance. With the user's permission, the technician gains instant access to the computer using a Web browser and can then diagnose and fix a problem remotely.

Using Virtual Assist from the Technician View

Technicians can connect to the SSL VPN appliance through two methods:

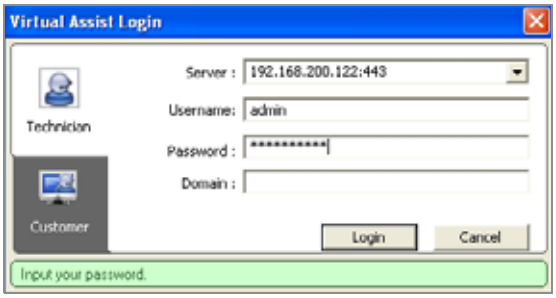
- If you are on the same LAN as the appliance, you can connect directly using the appliance's internal IP address.
- If you are not on the same LAN as the appliance, connect through OnDemand Tunnel, and then point your browser to the appliance.

Installing Virtual Assist Technician Console

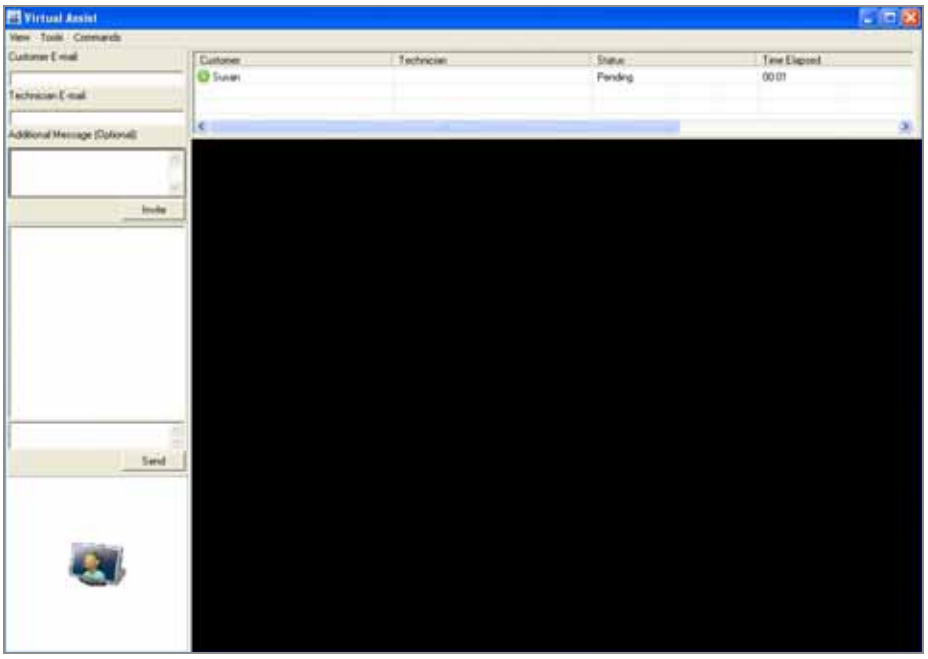
To launch a Virtual Assist session as a technician, perform the following steps.

1. Log in to the appliance management console and click **Virtual Assist** from the main navigation page.
2. Under the Downloads heading, click the **Download** link for the technician application.
3. A file opening dialog box appears for the **VASAC.exe** file. Click **Save File**.

4. An **Open File - Security Warning** pop-up window displays for the application. Click **Run**.
5. The **Virtual Assist Login** screen displays.

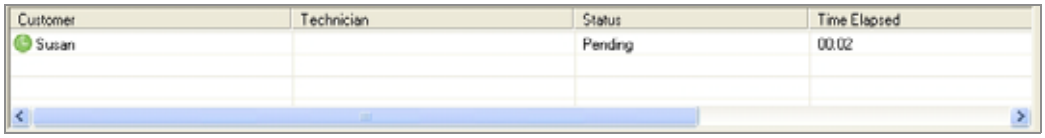


6. Fill in the required information for the correct **Server** IP address, **Username**, **Password** and, optionally, **Domain**.
7. Click **Login**. The Virtual Assist Console will display.



Managing the Virtual Assist Queue

Technicians use the **Virtual Assist Queue** to manage requests for Virtual Assist sessions.



The queue displays a table of all of the active Virtual Assist requests and active sessions. It contains the following columns:

Column	Description
Customer	The username of the client requesting assistance.
Technician	The username of the technician will display once the VA session has begun with the customer.
Status	The status of the client's VA session.
Time Elapsed	The duration of time that an assistance session has lasted, or the amount of time that a client has been waiting in the queue.

To begin a session with a client, click on the client's username in the **Customer** column. Once a session is initiated, the information in the queue will be updated.

Emailing an Invitation to a Client

Technicians can send an email invitation for a Virtual Assist session to clients.

Note: To send email invitations, an SMTP server must be configured for the SSL VPN appliance on the Services > SMTP page.

Technicians can send email invitations from the Virtual Assist console using the following steps:

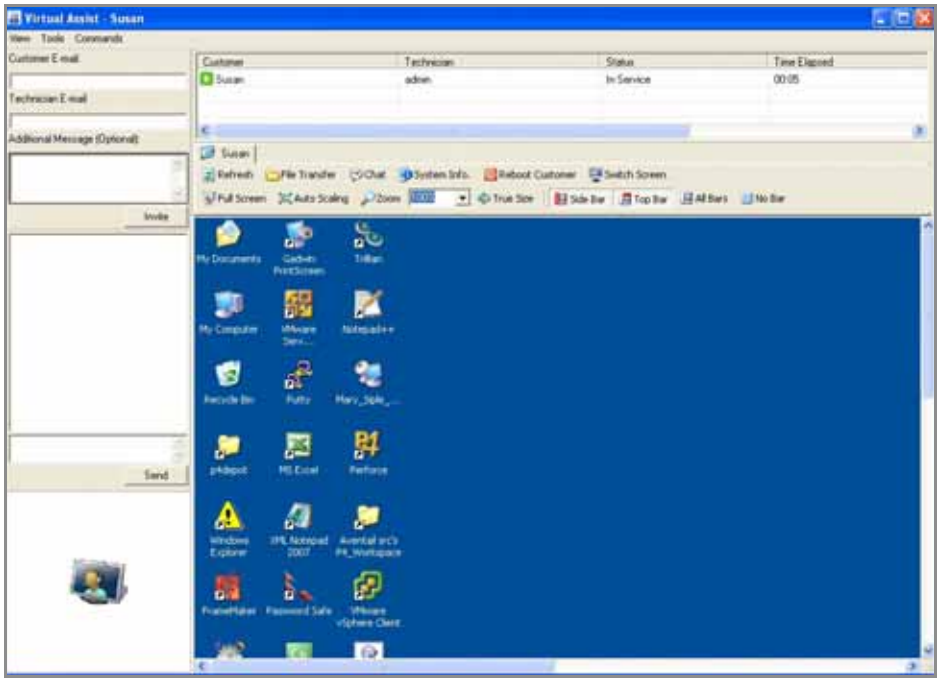
1. Enter the correct email address in the **Customer E-mail** field.
2. Enter your email address in the **Technician E-mail** field.
3. Optionally, enter a customized message in the **Additional Message** field.
4. Click **Invite** to send the invitation to the customer.

The queue will be updated to reflect this outstanding session invitation.

Assisting a Client

1. To assist a client, click on their **username** in the queue.
2. A dialog box will open in the console, as a connection to the customer is established.

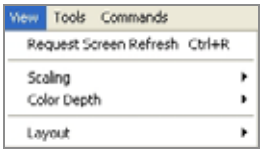
3. The customer's screen should now appear in the black section of the console.



Virtual Assist Technician Console Tools

Once a session is fully established with the customer, technicians have various tools at their disposal to provide assistance. There are three drop-down menus in the upper left of the console screen:

View Menu



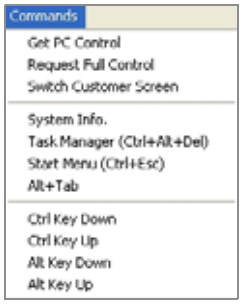
- **Request Screen Refresh** - Allows the technician to refresh the customer's screen on the console.

- **Scaling** - Allows the technician to adjust scaling between **Full Screen**, **Auto-Scale**, or **Normal**.
- **Color Depth** - Allows the technician to adjust color display to **Full** or **256 colors**.
- **Layout** - Allows the technician to **Hide** or **Show** the top and side bars on the console.

Tools Menu

- **File Transfer** - Allows the technician to transfer a file(s) to the customer's system. **The server connected to the appliance must be configured to support file transfers.**
- **Chat** - If the chat window is not already open in the side bar, the command activates the chat window for the technician to use to communicate.
- **Reboot** - Allows the technician to reboot the customer's system.

Commands Menu



- **Get PC Control** - Allows the technician to request control of the customer's desktop.
- **Request Full Control** - Allows the technician to request full control of the customer's system, including the ability to transfer files and reboot the system.
- **Switch Customer Screen** - Allows the technician to switch to a customer's secondary monitor, if the customer has an additional monitor configured on their system.
- **System Info** - Displays detailed information about the customer's system.
- **Task Manager** - Brings up the Task Manager on the customer's system.
- **Start Menu** - Brings up the Start Menu on the customer's system.
- **Alt+Tab** - Allows the technician to exit full-screen mode and select a different application.
- **Ctrl Key Up**, **Ctrl Key Down**, **Alt Key Up**, and **Alt Key Down** - Allows a technician to send these key commands to the customer's system.

Using Chat in Virtual Assist

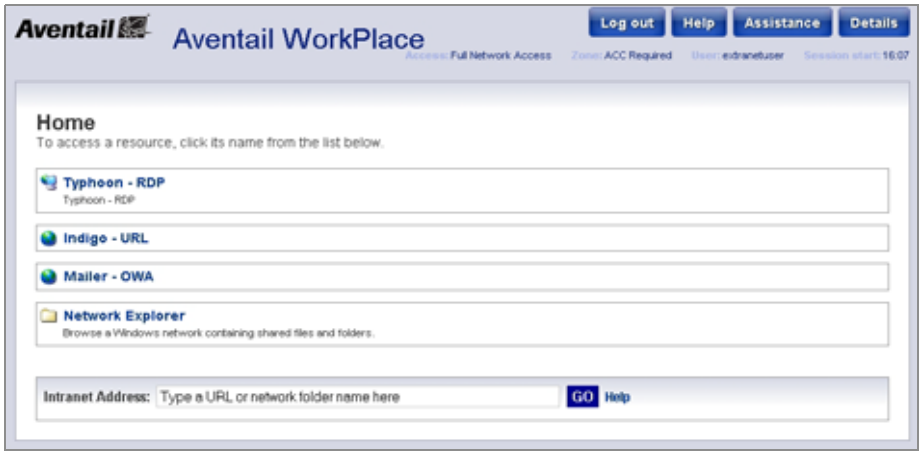
Using the chat tool, technicians can communicate back and forth with a customer in a Virtual Assist session. The chat window can be found on the side bar of the technician's console.

The upper section of the chat window displays the running conversation between the technician and the customer. Type replies into the lower section of the chat window, and click **Send** to post it to the conversation.

Using Virtual Assist from the Client View (Windows)

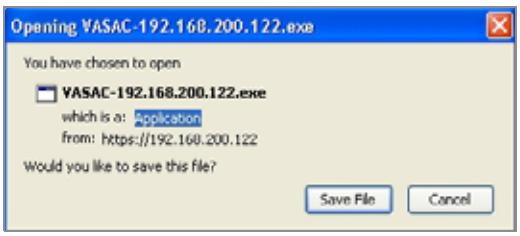
If your administrator has enabled Virtual Assist to be used through WorkPlace, follow the following steps to request a Virtual Assist session:

1. Log in to **WorkPlace.** The WorkPlace main page will display.

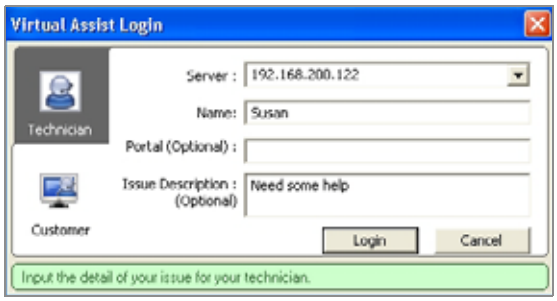


2. Click the **Assistance** button at the top right of the main page. If the Assistance button is not displayed, contact your administrator to enable Assistance on your WorkPlace layout.

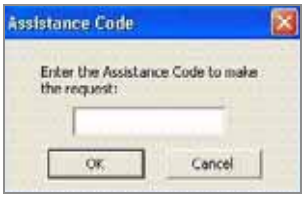
3. A file opening dialog box appears for the **VASAC** file. Click **Save File**.



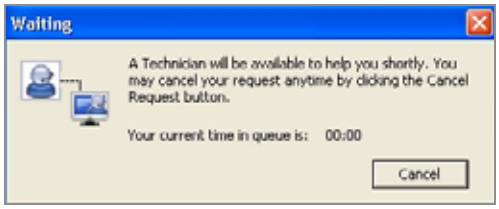
4. An **Open File - Security Warning** pop-up window displays for the application. Click **Run**.
5. The **Virtual Assist Login** screen displays.



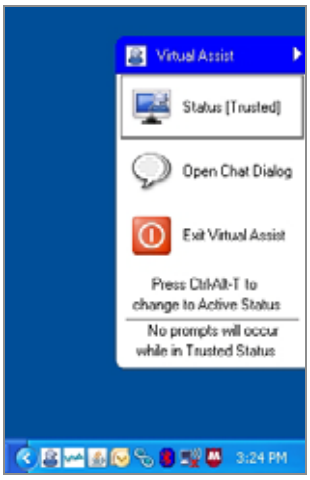
6. Fill in the required information for the correct **Server** IP address, **Name**, **Portal (optional)**, and an **Issue Description (optional)**. Click **Login**.
7. You may be prompted to supply a **Assistance Code** to complete your request for assistance. Once you have received this code from your administrator, fill in the provided field and click **OK**.



8. You will now be placed into the virtual assistance queue. A dialog box will display to inform you of this status.


Waiting
A Technician will be available to help you shortly. You may cancel your request anytime by clicking the Cancel Request button.
Your current time in queue is: 00:00
Cancel

9. When a technician is ready to service your request, the waiting queue dialog box will disappear, and the client tool taskbar will appear on your desktop. The technician will now be able to control your desktop.



10. The technician may **Request Full Control** of your system, which allows the technician to transfer files and reboot your system, if needed. If the technician makes this request, a dialog box will display. Click **OK** to grant permission.

Request Full Control Permission
Grant full control permission?
You will not receive prompts prior to certain actions such as file transfers if permission is granted.
OK
Cancel

Virtual Assist Client Console Tools (Windows)

Once a session is fully established with the technician, customers can still control aspects of the session using the pop-up menu. **Right-click on the Virtual Assist icon** in the taskbar to access the menu, if it does not appear on screen.

Virtual Assist
Status [Active]
Open Chat Dialog
Exit Virtual Assist
Press Ctrl-Alt-T to change to Trusted Status
No prompts will occur while in Trusted Status

The taskbar contains the following tools and session information:

- **Status** - Informs the customer as to the status of their session being **Trusted** (limited prompts before technician actions), **Active** (technician has desktop control, but provides more prompts before actions), or **Pending** (technician has view-only access to desktop). Click the status button to adjust the session setting.

- **Open Chat Dialog** - Allows the customer to open a chat window on their desktop to communicate with the technician.
- **Exit Virtual Assist** - Allows the customer to end a virtual assist session at anytime. This option also ends a technician's control over the customer's system.
- **Ctrl+Alt+T** - This command allows the session to be conducted in **Trusted Status**. In this mode, the customer will not receive dialog box requests asking permission for the technician to perform actions on the customer's system.

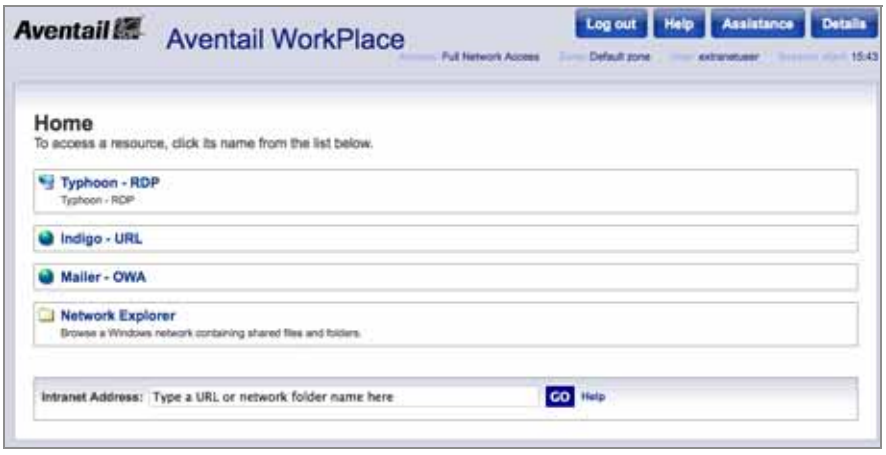
Using Virtual Assist from the Client View (Mac)

Virtual Assist is available for Mac users running Mac OS X 10.5 or later, with either the Safari or Firefox browser. Both Java and JavaScript must be enabled.

If your administrator has enabled Virtual Assist to be used through WorkPlace, follow these steps to request a Virtual Assist session:

1. Log in to **WorkPlace.**

2. The WorkPlace main page will display.



3. Click the **Assistance** button at the top right of the main page. If the Assistance button is not displayed, contact your administrator to enable Assistance on your WorkPlace layout.

4. You may now enter a ticket to request a Virtual Assistance session.

Virtual Assist
Request Assistance
Wait for Tech
Install Software
Receive Assistance
Tour
Take the Tour to learn how Virtual Assist works
FAQ
Why do I have to install software to receive assistance?
What if I deal with sensitive information?
More FAQs >
To begin a virtual assist session with your technician, please enter your name and click the Request Assistance button. In just a few moments, there will be an established remote desktop connection between your computer and your technician.
Name:
Assistance Code:
Issue Summary:
(128 characters maximum)
Request Assistance
You will be asked to install software so that a technician can control your machine remotely. You will always have overriding control of your machine throughout the session.

5. Complete the available fields with your **Name**, **Assistance Code** (if required), and a **Summary** of the issue for which you are seeking assistance. Click the **Request Assistance** button to submit the ticket. **Contact your administrator for an assistance code, if needed.**

Name:
Matt
Assistance Code:
12345
Issue Summary:
(128 characters maximum)
I cannot see my email in English. It all appears in Chinese characters. Please help me with this issue.
Request Assistance
You will be asked to install software so that a technician can control your machine remotely. You will always have overriding control of your machine throughout the session.

6. You will now be placed in the queue for assistance from a technician. Your current wait time is reflected onscreen.

Request Assistance
Wait for Tech
Install Software
Receive Assistance
Thank you for your patience.
A Technician will be available to help you shortly. You may cancel your request anytime by clicking the Cancel Request button.
Your current time in queue is: 00:00
Cancel Request

7. Once a technician accepts your ticket for assistance, your system will launch the Virtual Assist applet. A dialog box message may ask you to accept the applet to run it on your system.

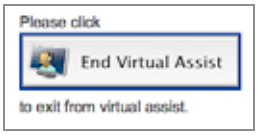
Request Assistance
Wait for Tech
Install Software
Receive Assistance
Launching Virtual Assist...
Download and run the virtual assist application if it does not automatically install.
Please save the file then run it. Running directly may fail due to limitations in your browser. Do not rename the file or the assistance program will not function properly.

8. Once the Virtual Assist session is established, the technician will now have remote control of your desktop. You can minimize your browser window, if desired.

Virtual Assist
In order to receive assistance we will need to install some software so the Technician can control your PC.
Please allow applets to run if you have Java enabled.
Please follow the manual download instructions if you do not have Java enabled. You do not need to have Java installed to receive assistance and may ignore any prompts regarding Java.
Please click
End Virtual Assist
to exit from virtual assist.
Request Assistance
Wait for Tech
Install Software
Receive Assistance
The technician should have shared control of your PC soon. Please install the software if you have not done so already.
To end the session at any time, click the "End Virtual Assist" button on the left side of your browser screen.

Chat functionality is not available as part of the Virtual Assist Mac client.

9. Users maintain control of their system throughout a Virtual Assist session with a technician. At any time you wish to terminate the session, click the **End Virtual Assist** button within the browser window.



10. The page refreshes to reflect you have successfully logged out of a Virtual Assist session.

Cache Cleaner and Secure Virtual Desktop

Your system administrator can configure WorkPlace to require Cache Cleaner or Secure Virtual Desktop for data protection. Both Cache Cleaner and Secure Virtual Desktop provide data security by removing sensitive information from your computer after each session. This is especially important when you access your remote network from public computers, such as those found in Internet kiosks or hotel business centers.

Notes

- Secure Virtual Desktop is supported only on Windows clients. Cache Cleaner is supported on clients running Windows or Mac OS X.

Cache Cleaner and Secure Virtual Desktop perform cleanup actions and then exit when you do any of the following:

- Click **Logout** on the WorkPlace portal page
- Close the browser window in which WorkPlace is running
- Manually exit Secure Virtual Desktop
- Are inactive for a certain period of time (determined by your administrator)

Before it exits, Cache Cleaner removes all temporary data cached by any Web browser used during your network session, including cookies, browser history, stored passwords, auto-completion text, downloaded files, and temporary files.

Before exiting, Secure Virtual Desktop closes any applications open within the desktop emulator, removes all programs installed via the desktop emulator, and deletes all data downloaded from the VPN and exits all VPN client programs. As part of the data deletion process, Secure Virtual Desktop obfuscates the data by writing random or “zeroed” data over it.

Using Cache Cleaner

When enabled, Cache Cleaner automatically downloads and runs each time you log in to WorkPlace. Cache Cleaner will prompt you to accept an Aventail security warning that is displayed at WorkPlace startup.

▶ **To start Cache Cleaner**

During WorkPlace startup, in the Aventail security warning dialog box that appears, click **Yes**.

Notes

- To prevent the Aventail security warning dialog box from appearing in the future, select the **Always trust content from Aventail** check box before clicking **Yes**.

The Cache Cleaner icon appears in the taskbar notification area, and Cache Cleaner runs in the background during your network session.

Cache Cleaner Icon

If configured by your administrator, you can disable Cache Cleaner. Once disabled, you can enable it again. If this option is not allowed by your administrator, the **Disable** selection will be grayed out in the right-click popup menu.

▶ **To disable Cache Cleaner**

Right-click the Cache Cleaner icon and select **Disable** from the list.

▶ **To enable Cache Cleaner**

Right-click the Cache Cleaner icon and select **Enable** from the list

At the end of your network session, Cache Cleaner removes any temporary data stored on your system.

▶ **To exit Cache Cleaner**

Log out of WorkPlace.

Upon logout, WorkPlace advises you that it will close all browser windows. A dialog box is displayed to notify you of this action and confirm your logout. To close all browser windows, click **OK**. To leave your browser windows open, click **Cancel**. If you select Cancel, your cached data will be deleted when all browser windows are closed.

Using Secure Virtual Desktop

When enabled, Secure Virtual Desktop automatically downloads and runs each time you log in to WorkPlace. You are initially required to download and install the client component manager, Aventail Access Manager, as part of WorkPlace portal access. Aventail Access Manager automatically deploys Secure Virtual Desktop on your computer. This includes download and installation the first time, but returning users do not repeat the download process unless a new version is available.

Secure Virtual Desktop may prompt you to accept an Aventail security warning that is displayed at WorkPlace startup.

▶ **To start Secure Virtual Desktop**

During WorkPlace startup, in the Aventail security warning dialog box that appears, click **Yes**.

Notes

- To prevent the Aventail security warning dialog box from appearing in the future, select the **Always trust content from Aventail** check box before clicking **Yes**.

When launch is complete, you will see the Secure Virtual Desktop background desktop image and browser portal page. The Secure Virtual Desktop icon appears in the taskbar notification area, and Secure Virtual Desktop runs in the background during your network session.

Secure Virtual Desktop icon

While running Secure Virtual Desktop, you can launch new browser windows, use browser add-ins, and run locally installed applications. You can save data to files within the desktop emulator session for purposes of uploading. You can also download and install new programs within the context of the desktop emulator. These programs are only accessible within the Secure Virtual Desktop window.

All data transferred to the client file system via the WorkPlace portal session is protected from access by any application running outside the desktop emulator session. This prevents opening the file outside the context of Secure Virtual Desktop.

If enabled by your administrator, you can switch between Secure Virtual Desktop and your normal desktop.

▶ **To switch between the Secure Virtual Desktop window and your normal desktop**

Right-click the Secure Virtual Desktop icon in the system tray and select **Switch** from the list.

You can also use the right-click menu to exit Secure Virtual Desktop.

▶ **To exit Secure Virtual Desktop**

Right-click the Secure Virtual Desktop icon in the system tray and select **Exit** from the list.

At the end of your network session, Secure Virtual Desktop closes any applications open within the desktop emulator, removes all programs installed via the desktop emulator, and deletes all data downloaded from the VPN and exits all VPN client programs. As part of the data deletion process, Secure Virtual Desktop obfuscates the data by writing random or “zeroed” data over it.

Upon logout, WorkPlace advises you that it will close all browser windows. A dialog box is displayed to notify you of this action and confirm your logout. To close all browser windows, click **OK**. To leave your browser windows open, click **Cancel**. If you select Cancel, your cached data will be deleted when all browser windows are closed.

Troubleshooting

This section describes how to troubleshoot basic connection problems.

Viewing Connection Status Information

If you are having trouble accessing your network resources through WorkPlace, your system administrator may ask you for connection status information. You can view status information for any enabled access methods by clicking the **Details** link in the connection status area in WorkPlace. This displays the WorkPlace **System status** page, which includes information that can be helpful in troubleshooting connection problems.

In the **Aventail agents** area of the **System Status** page, you can click an agent’s **Details** link to view additional connection status information.

Viewing Security Zone Information

Depending on how your administrator has configured WorkPlace, the **System status** page may display information about your current security zone. Your zone is determined by your environment or the type of computer you are using to access WorkPlace. For example, if you log in to WorkPlace from a laptop that your IT department owns and maintains, you may be placed in a more “trusted” zone than if you are logging in from an airport kiosk.

Your zone status may determine whether an Aventail data security agent (such as Cache Cleaner or Secure Virtual Desktop) is deployed. This zone information can also be helpful in troubleshooting WorkPlace problems.

Troubleshooting Tips

This section describes how to troubleshoot basic WorkPlace problems.

Troubleshooting Full Network Access Problems

If you are having trouble connecting to your network resources with full network access, see if your problem is addressed in the following list of troubleshooting tips. If the problem persists, contact your system administrator.

- If you use a personal firewall, you may need to configure the firewall before you can access your network resources. To do this, configure the firewall to allow *ngvpnmgr.exe* to access the Internet, and add the remote network's host name or IP address as a trusted host or zone. For more information, contact your system administrator.
- Depending on how your administrator has configured WorkPlace, your local network resources may be unavailable when you are connected to the VPN. If you are unable to access a local network resource, such as a network printer, quit the access agent or log out of WorkPlace and then try again.
- If you are a restricted user (that is, without administrative privileges), ensure that your Web browser is configured to support Java. Note that you must be running the Sun Java Runtime Environment (JRE); the Microsoft JVM is not supported.
- If you are an unrestricted user, ensure that your Web browser is configured to enable either ActiveX controls or Java.
- If you are prompted to enable the ActiveX control in your Web browser, be sure to click **Yes**.
- If you receive an error message indicating that the tunnel could not be established, contact your system administrator for more information.
- If you have full network access, you will see an icon in the taskbar notification area. If the access agent stops running or if you experience an interruption in service, a connection-status alert appears above this icon. The information displayed in this alert may be helpful in troubleshooting the problem.

Troubleshooting Agent Provisioning or Activation Problems

The first time you log in to WorkPlace, you may be prompted to install Aventail Access Manager. It installs and manages updates for any agents required to access your network. If an error should occur during the installation process, it is recorded in a log file that your system administrator can use to troubleshoot the problem. Once Aventail Access Manager is installed, the only other time you may be (briefly) aware of it is when an agent needs to be updated.

If you are having trouble installing or using an access agent, try the following:

- Enable ActiveX in your Web browser.
- Enable Java in your Web browser.
- Install the Sun Java Runtime Environment (JRE) on your system.
- If you use a personal firewall, you may be prompted to block or permit access to Aventail Access Manager when you install it, or when you try to run an access agent. This dialog may pop up behind the WorkPlace browser window: if your login seems stalled, check to see if a security dialog is awaiting a response from you. If you are prompted, choose to permit access.
- Have your system administrator grant you the privileges required to install software on your computer.

After you have corrected the problem, click **Clear system profile** on the **System status** page to re-initialize your system, log out of WorkPlace, and then log in again.

In some cases, an access agent may not be activated due to a general connection error. If this occurs, log out of WorkPlace and then log in again.

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SONICWALL®

DYNAMIC SECURITY FOR THE GLOBAL NETWORK™

Aventail™

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